

## **STARCH INFORMATION SOURCES STUDY**

**1996 - 2010**

*Prepared for:*

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March 31, 2010

Canada 

 **Ontario**  
Ontario Media Development  
Corporation  
Société de développement  
de l'industrie des médias  
de l'Ontario

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# INFORMATION SOURCES STUDY 2010

## Introduction

The Canadian Business Press (CBP), established in 1920 and incorporated as a not-for-profit association in 1981, is the industry association for Canada's 740 business, professional and farm publications across Canada. These publications – known as “B2B publications” - are important sources of information exchange across a wide variety of industries and represent fully 27% of all magazine titles in the country.

It has been said that for every industry, profession or business in Canada there is a specialty publication aimed directly at keeping its participants informed about their businesses, about what's new and interesting to them, and what trends they can expect in their respective fields. However, since this type of business media is so carefully targeted to specialized audiences, many people are simply unaware of its existence or of how broad the industry really is. Doctors, lawyers, teachers, construction companies, oil workers, grocers, benefits professionals, dentists, pharmacists, welders, pilots, hard goods retailers and automobile dealers all have their own publications geared to their particular needs, as does almost every other industry, profession or business in the country.

Business and professional publications provide reliable, industry-specific news and information as well as being repositories of knowledge on the sectors they cover and are the ultimate targeted medium. Their raison d'être is built on reaching and serving highly specialized targeted groups of Canadians in business, agriculture and the professions.

CBP is an action-oriented association that zeroes in on the pressing needs of business publishers in Canada. The Association acts for the industry to develop standards, to present the case for business publications to governments, related organizations, readers, agencies, the media and the public. Together its members accomplish what cannot be done individually. Members receive real value through lobbying, educational seminars, newsletters, networking, original research, among other services.

## **Background**

The first Information Sources Study was conducted by Starch Research in Canada in 1996. The objective was to determine the role the business press played in the communication of business information to key purchasing decision makers. Additionally, the study was designed to measure the usefulness of all media that buyers might use.

The study also sought to explore how the various media and information sources were employed in different industries.

The follow up studies in 2000 and 2004 revealed a lot about the role of Business Publications during a period when the Internet experienced explosive growth. The 2010 study was designed to update the previous studies and learn more about the role and use of the Internet and specifically business-to-business websites.

## **Sampling**

The study universe was the combined unduplicated circulation of the major publications covering the specific marketplaces – 58 individual publications. This is the highest level of publisher participation in any of the Information Sources Studies conducted to date.

For each market, the random lists submitted by each participating publication were merged to create a master file. At this point, duplicate names and incomplete addresses were deleted from the file to create an unduplicated sample frame. A systematic random interval sample was drawn to create the sample for each market.

## **Procedures**

Upon drawing the sample for each market, Starch prepared and addressed individual mailing pieces consisting of an explanatory cover letter, a questionnaire, draw card and a postage paid business reply envelope. For the first time in 2010 respondents had the opportunity to respond to the survey online. A separate URL was created for each market measured. To minimize potential bias, two versions of the questionnaire were prepared for each market where the presentation of the fourteen information sources was rotated.

Each survey package was mailed to the specific marketplace sample under the letterhead of Starch Research Services Limited, signed by Brian Hickey, President.

Survey results are based on a total of 693 respondents who are involved in developing specifications, selecting suppliers or approving expenditures for their company or business.

A draw for a Best Buy Gift Certificate was offered as an incentive. There was a grand prize of a \$500 certificate, five \$100 certificates, ten \$50 certificates and twenty \$25 certificates. Additionally, an incentive of \$1.00 coins was used in follow-up mailings. The survey was mailed between February 4 and February 24, 2010. Follow-up mailings were sent out between March 12 and March 25, 2010.

## **Methodology**

Based upon representative audiences, scientific sampling, standardized questionnaires and strict methodological controls, the results of these surveys provided an understanding of the relative value applied to the various information sources.

The studies elicited whether or not respondents were responsible for recommending, specifying or purchasing products or services for their companies. Further, questions were asked to determine the nature of business information needs and the importance of having Canadian business publications serving each market. Questions on website usage, actions taken as a result of visiting websites and websites preferred were included.

## Information Sources

Each Information Source was rated on a numeric scale, where '0' was Not At All Useful and '10' was Very Useful.

The Information Sources evaluated in the study were:

- Specialized Business Publications or Industry Newspapers
- General Business Publications
- Trade Shows
- Daily Newspapers
- Salespeople
- General Interest Consumer magazines
- The Internet
- News Magazines
- Conventions/Seminars
- Network Television
- Direct Mail
- Specialty Television
- Business Directories
- Radio

## Markets Measured

- Agriculture
- Automotive & Trucking
- Computers & Technology
- Manufacturing
- Resources & Construction
- Retail
- Travel & Tourism

Tables in the report show:

- Summary scores where Very Useful refers to respondents who answer 7, 8, 9 or 10 on the rating scale.
- The average rating based on the entire scale (0 to 10).
- The ranking (from 1 to 14) from the most useful to the least useful information source.
- A comparison to the results of the Information Sources studies conducted in 1996, 2000 and 2004.

## Questionnaire

A generic version of the questionnaire can be found in the Appendix. The questionnaire was customized for each of the seven markets measured. Five of the markets were measured in 1996, 2000, 2004 and 2010. Agriculture has been measured since 2000 and Travel & Tourism was measured for the first time in 2010.

## Key Findings

Across seven diverse industrial sectors and fourteen different media and information sources, there are seven principal sources that are highly valued and relied upon by business decision makers. Six of these are easily identified as traditional business-to-business media:

- Specialized Business Publications
- Trade Shows
- Conventions & Seminars
- Salespeople
- Direct Mail
- Business Directories

The seventh principal business-to-business information source, the Internet, has shown spectacular growth in influence since first evaluated in 1996.

2010 Rank		% Reporting Very Useful			
		1996	2000	2004	2010
1	Internet	22	53	53	76
2	Specialized Business Publications	66	66	69	67
3	Trade Shows	60	60	56	67
4	Conventions/Seminars	49	49	50	56
5	Salespeople	58	55	50	51

The Internet showed a significant 23 percentage point gain since 2004, which launched it into the top position.

While both rankings and ratings changed for several information sources, Specialized Business Publications maintained their high overall rating of usefulness and a second place ranking, just behind Internet.

Trade shows have shown a gain of 11 percentage points since 2004, and are tied in their overall rating with Specialized Business Publications. Conventions/Seminars showed a gain of 6%.

Rating of Salespeople has declined steadily from 1996 (Very Useful 58%) to 2004 (50%) but has maintained its overall rating in 2010 (51%).

## Internet Growth by Market Sector

The following table shows the “Very Useful” Rating and Ranking (out of 14) for the Internet from 1996 to 2010.

	1996		2000		2004		2010	
	Rating	Rank	Rating	Rank	Rating	Rank	Rating	Rank
	%		%		%		%	
Computers & Technology	53	4	82	1	83	1	90	1
Resources & Construction	15	8	56	5	59	3	85	1
Manufacturing	18	8	55	4	57	3	79	1
Automotive & Trucking	9	14	38	6	46	4	69	1
Retail	13	12	32	6	46	4	63	2
Agriculture	-	-	27	9	40	9	66	3
Travel & Tourism	-	-	-	-	-	-	78	1

The Computer & Technology sector naturally places the highest value on the Internet. Other sectors however have been quick to adapt to the technology and the Internet’s usefulness.

Even markets that have traditionally relied on more frequent face-to-face contact now use the technology extensively. Tremendous increases have been realized in the past few years.

Market	2004	2010	Gain (percentage points)
	%	%	
Resources & Construction	59	85	+26
Manufacturing	57	79	+22
Automotive & Trucking	46	69	+23
Retail	46	63	+17
Agriculture	40	66	+26

Major contributors to the extensive growth of the Internet since 2004 have been the publishers who have embraced the technology and added value to their brands and marketers who have used business publication advertising to generate website traffic.

## Rating and Ranking of Business Publications

	<b>Business Publications</b>		
	<b>Very Useful %</b>	<b>Average</b>	<b>Rank</b>
Agriculture	77	7.5	2
Manufacturing	69	7.1	2
Resources & Construction	66	6.8	2
Retail	63	6.8	2
Automotive & Trucking	63	6.8	2
Travel & Tourism	69	7.3	3
Computers & Technology	66	7.0	3

While usefulness ratings vary according to the type of industry, Business Publications are rated second or third in all seven markets measured.

## Salespeople

Salespeople have dropped from third to fifth in ranking. There has been a steady decline since 1996.

	Very Useful	Rank
	%	(out of 14)
1996	58	2
2000	55	3
2004	50	3
2010	51	5

While Agriculture, and to a lesser degree Automotive & Trucking, show a gain over 2004, the importance of Salespeople has dropped in every other market, particularly Resources & Construction.

	% Rating Salespeople 'Very Useful'				Difference
	1996	2000	2004	2010	2004 - 2010
	%	%	%	%	
Agriculture	-	46	39	54	+15
Automotive & Trucking	54	50	51	53	+2
Computers & Technology	43	40	47	45	-2
Manufacturing	64	59	57	50	-7
Resources & Construction	64	59	58	42	-16
Retail	65	68	69	60	-9

New technology and the high cost of managing a sales force have resulted in fewer sales representatives and a corresponding drop in their usefulness rating and particularly, their ranking.

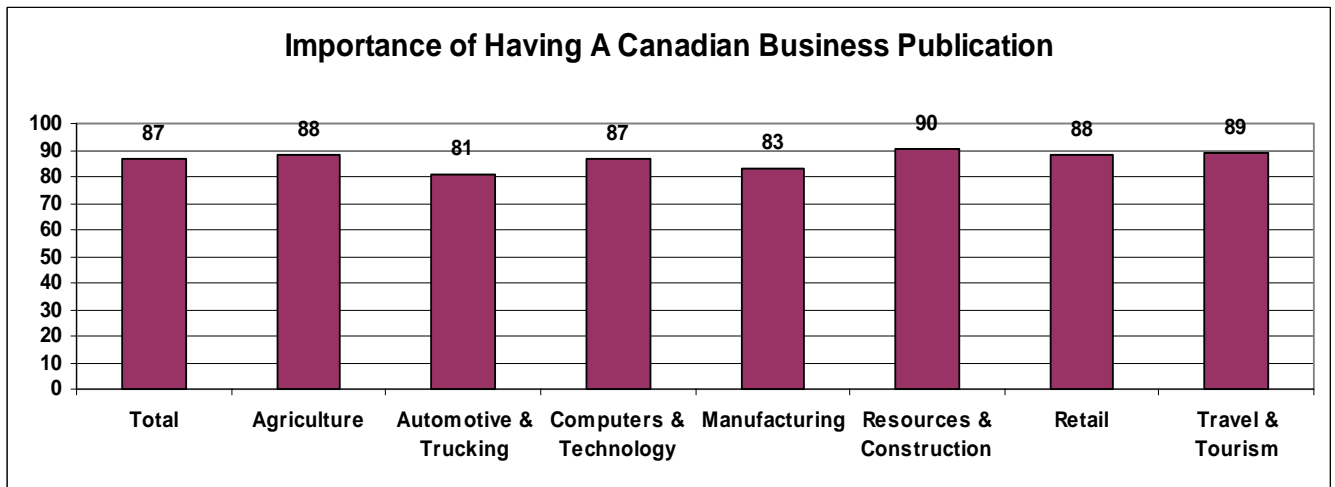
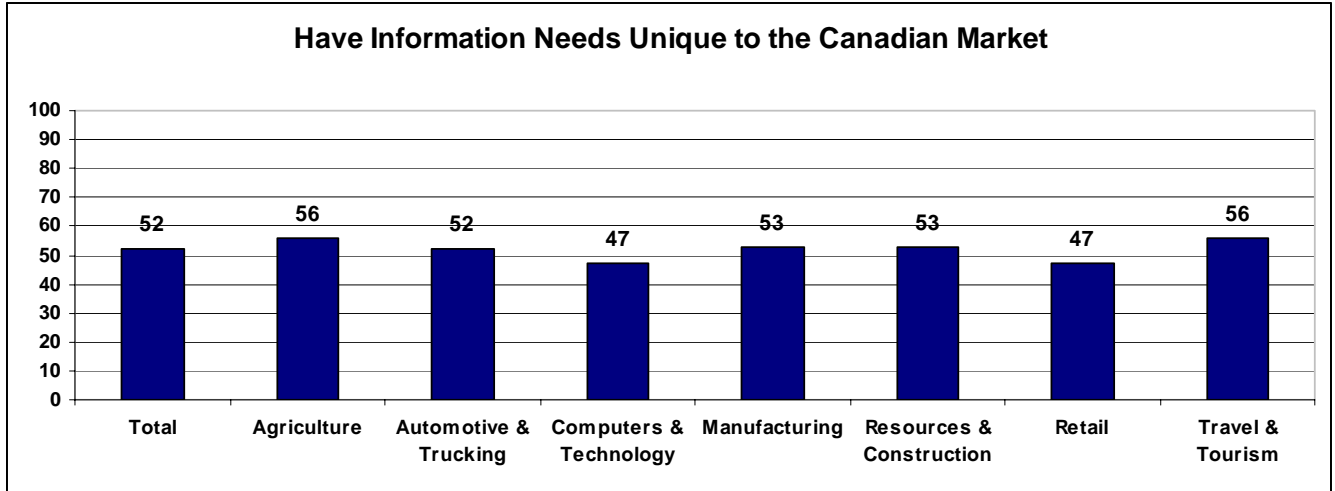
However, there is still an important need for personal contact and this is reflected in the increase in the value of Trade Shows and the steady numbers for Conventions/ Seminars.

## Top Three Information Sources by Market - 2010

Business Publications rank second or third in all sectors and support other marketing communication initiatives.

<b>Manufacturing</b>	<b>Very Useful</b>	<b>Average</b>	<b>Retail</b>	<b>Very Useful</b>	<b>Average</b>
	%			%	
Internet	79	7.5	Trade Shows	65	6.9
<b>Business Publications</b>	<b>69</b>	<b>7.1</b>	Internet	63	6.9
Trade Shows	63	6.9	<b>Business Publications</b>	<b>63</b>	<b>6.8</b>
<b>Automotive &amp; Trucking</b>	<b>Very Useful</b>	<b>Average</b>	<b>Computers &amp; Technology</b>	<b>Very Useful</b>	<b>Average</b>
	%			%	
Internet	69	7.3	Internet	90	8.5
<b>Business Publications</b>	<b>63</b>	<b>6.8</b>	Conventions/Seminars	67	7.1
Trade Shows	60	6.7	<b>Business Publications</b>	<b>66</b>	<b>7.0</b>
<b>Resources &amp; Construction</b>	<b>Very Useful</b>	<b>Average</b>	<b>Agriculture</b>	<b>Very Useful</b>	<b>Average</b>
	%			%	
Internet	85	7.9	Trade Shows	82	7.8
<b>Business Publications</b>	<b>66</b>	<b>6.8</b>	<b>Business Publications</b>	<b>77</b>	<b>7.5</b>
Trade Shows	63	6.9	Internet	66	7.1
<b>Travel &amp; Tourism</b>	<b>Very Useful</b>	<b>Average</b>			
	%				
Internet	78	7.8			
Trade Shows	75	7.6			
<b>Business Publications</b>	<b>69</b>	<b>7.3</b>			

## IMPORTANCE OF CANADIAN BUSINESS PUBLICATIONS



Fifty-two percent of respondents have information needs that are unique to the Canadian market. Eighty-seven percent claim it is important to have Canadian Business Publications in their industry.

## Website Usage

- 80% directly searched for and visited a website belonging to a specific supplier or manufacturer.
- 70% visited a website belonging to a specialized business publication or business newspaper.
- 68% visited a website belonging to a supplier or manufacturer through a link on a publication's website.
- 58% visited a supplier or manufacturer website based on an ad in a specialized business publication.
- 61% visited a supplier or manufacturer website based on an article or new product announcement in a specialized business publication.

After visiting a business related website, 90% of respondents took one or more actions.

- 72% made an inquiry
- 71% sourced a supplier or product
- 50% made a purchase

## The Case for Business Publications

- While the Internet has moved to the number one spot in ranking, business publications have maintained their high usefulness ratings and are ranked second overall (tied with Trade Shows).
- The nearest competitors to business publications are Trade Shows and Convention/Seminars. They are both high cost and low frequency alternatives. Both often have a very limited reach among the many decision makers in companies. Trade Shows have shown a large increase over the previous study emphasizing the need for personal contact. This may be due to the declines seen in the ratings for Salespeople.
- High frequency, high retention levels and routing lists within companies mean business publications reach the multiple buying influences that exist in a single company.
- Business Publications are the logical base buy in any business-to-business marketing communication program.
  - highly targeted to buyers in virtually every industrial/professional sector
  - low cost per thousand reach
  - high quality credible environment to showcase products and services.
  - retention of issues for reference creates multiple ad exposure opportunities
  - business publications are the only medium with the customer every working day (and often taken home)
  - pass along and routing means readership is generally three times greater than circulation.

- Business Publications are the original source of most inquiries and sales. Beyond business reply cards, business publication ads can also carry fax numbers, 1-800 numbers, e-mail addresses and website addresses. Ads in business publications are the reason these inquiry mechanisms are so successful for advertisers. Further, improved publication websites now direct traffic directly to supplier websites.
- Business Publications complement all other marketing activities. As the base media buy with the broadest coverage, it supports sales force activity, promotes trade shows, drives website traffic, and promotes conferences/seminars.
- Business Publications are the main medium for creating brand awareness. The only medium where product benefits can be presented in detail.
- Relevant high quality editorial environments create a credible context for advertisers. Readers are interested and involved and advertisers benefit from that relationship and trust.
- Business Publication reading requires the undivided attention of the reader. This results in more concentration and better ad recall than other media can provide.
- As the lowest cost, highest frequency and highest reach medium available to business-to-business advertisers, business publications offer the best return on the media investment.
- Business Publications are the original source of the inquiries that generate sales. This is why 87% of business buyers claim Canadian Business Publications are important in their industry/profession.
- High proportions of respondents visit business publication websites and then are linked to supplier/manufacturer sites.
- Nearly 6 in 10 buyers claim to have visited a supplier or manufacturer's website based on an ad in a specialized business publication.

**DETAILED TABLES**

**1996 - 2010**

**OVERALL SUMMARY  
ALL MARKET SECTORS**

**Ranking**

Information Source	Total Summary 2010			Total Summary 2004			Total Summary 2000			Total Summary 1996		
	Very Useful	Avg.	Rank	Very Useful	Avg.	Rank	Very Useful	Avg.	Rank	Very Useful	Avg.	Rank
	%			%			%			%		
<b>The Internet</b>	76	7.6	1	53	6.0	4	53	6.1	4	22	3.6	8
<b>Specialized Business Publications or Industry Newspapers</b>	67	7.0	2	69	7.1	1	66	7.1	1	66	7.1	1
<b>Trade Shows</b>	67	7.1	2	56	6.3	2	60	6.7	2	60	6.6	2
<b>Conventions/Seminars</b>	56	6.3	4	50	5.7	5	49	5.9	5	49	5.9	4
<b>Salespeople</b>	51	6.2	5	50	6.1	3	55	6.5	3	58	6.6	2
<b>Direct Mail</b>	39	5.5	6	35	5.2	6	35	5.2	6	32	5.1	6
<b>Business Directories</b>	32	4.9	7	29	4.6	7	31	4.8	7	35	5.2	5
<b>General Business Publications</b>	31	4.9	8	25	4.3	8	23	4.3	8	25	4.4	7
<b>Daily Newspapers</b>	30	4.5	9	23	4.1	10	18	3.6	9	19	3.6	8
<b>Specialty Television</b>	21	3.6	10	12	2.8	14	9	2.3	13	8	2.2	13
<b>News Magazines</b>	19	3.7	11	12	3.0	12	8	2.6	11	10	2.7	10
<b>Network Television</b>	18	3.7	12	12	2.9	13	9	2.5	12	9	2.4	12
<b>Radio</b>	18	3.4	12	19	4.3	8	9	2.3	13	10	2.6	11
<b>General Interest Consumer Magazines</b>	17	3.4	14	15	3.1	11	12	2.9	10	8	2.2	13

**OVERALL SUMMARY  
AGRICULTURE**

**Ranking**

Information Source	Total Summary 2010			Total Summary 2004			Total Summary 2000		
	Very Useful	Avg.	Rank	Very Useful	Avg.	Rank	Very Useful	Avg.	Rank
	%			%			%		
Trade Shows	82	7.8	1	60	6.7	2	59	6.6	2
Specialized Business Publications or Industry Newspapers	77	7.5	2	78	7.5	1	75	7.6	1
The Internet	66	7.1	3	40	4.8	9	27	4.5	9
Conventions/Seminars	66	6.8	3	50	5.7	4	51	6.0	3
Direct Mail	55	6.2	5	40	5.5	5	46	5.9	4
Salespeople	54	6.4	6	39	5.4	6	46	5.9	4
Business Directories	34	5.3	7	35	5.0	8	33	5.0	8
General Business Publications	31	4.9	8	25	4.3	10	21	4.3	10
Radio	28	4.3	9	44	6.6	3	43	5.8	6
Daily Newspapers	25	4.5	10	37	5.1	7	34	5.2	7
Network Television	17	3.8	11	18	3.7	11	23	4.2	11
Specialty Television	16	3.7	12	17	3.4	13	22	3.8	12
News Magazines	15	3.6	13	16	3.3	14	13	3.3	14
General Interest Consumer Magazines	14	3.4	14	18	3.5	12	16	3.5	13

**OVERALL SUMMARY  
AUTOMOTIVE & TRUCKING**

**Ranking**

Information Source	Total Summary 2010			Total Summary 2004			Total Summary 2000			Total Summary 1996		
	Very Useful	Avg.	Rank	Very Useful	Avg.	Rank	Very Useful	Avg.	Rank	Very Useful	Avg.	Rank
	%			%			%			%		
<b>The Internet</b>	<b>69</b>	<b>7.3</b>	<b>1</b>	<b>46</b>	<b>5.5</b>	<b>4</b>	<b>38</b>	<b>4.9</b>	<b>6</b>	<b>9</b>	<b>2.4</b>	<b>14</b>
<b>Specialized Business Publications or Industry Newspapers</b>	<b>63</b>	<b>6.8</b>	<b>2</b>	<b>65</b>	<b>7.0</b>	<b>1</b>	<b>63</b>	<b>6.7</b>	<b>1</b>	<b>61</b>	<b>6.7</b>	<b>1</b>
<b>Trade Shows</b>	<b>60</b>	<b>6.7</b>	<b>3</b>	<b>48</b>	<b>5.9</b>	<b>3</b>	<b>54</b>	<b>6.3</b>	<b>2</b>	<b>54</b>	<b>6.1</b>	<b>3</b>
<b>Salespeople</b>	<b>53</b>	<b>6.2</b>	<b>4</b>	<b>51</b>	<b>6.1</b>	<b>2</b>	<b>50</b>	<b>6.0</b>	<b>3</b>	<b>54</b>	<b>6.2</b>	<b>2</b>
<b>Conventions/Seminars</b>	<b>47</b>	<b>5.6</b>	<b>5</b>	<b>39</b>	<b>5.1</b>	<b>6</b>	<b>36</b>	<b>5.0</b>	<b>5</b>	<b>38</b>	<b>5.0</b>	<b>4</b>
<b>General Business Publications</b>	<b>37</b>	<b>5.0</b>	<b>6</b>	<b>19</b>	<b>4.2</b>	<b>9</b>	<b>22</b>	<b>4.3</b>	<b>8</b>	<b>23</b>	<b>4.2</b>	<b>7</b>
<b>Daily Newspapers</b>	<b>37</b>	<b>4.9</b>	<b>6</b>	<b>24</b>	<b>4.2</b>	<b>9</b>	<b>25</b>	<b>4.1</b>	<b>9</b>	<b>23</b>	<b>4.0</b>	<b>8</b>
<b>Business Directories</b>	<b>32</b>	<b>4.8</b>	<b>8</b>	<b>29</b>	<b>4.8</b>	<b>7</b>	<b>28</b>	<b>4.5</b>	<b>7</b>	<b>29</b>	<b>4.9</b>	<b>5</b>
<b>Direct Mail</b>	<b>31</b>	<b>5.1</b>	<b>9</b>	<b>40</b>	<b>5.4</b>	<b>5</b>	<b>38</b>	<b>5.4</b>	<b>4</b>	<b>28</b>	<b>4.8</b>	<b>6</b>
<b>Specialty Television</b>	<b>25</b>	<b>4.0</b>	<b>10</b>	<b>16</b>	<b>3.1</b>	<b>12</b>	<b>11</b>	<b>2.4</b>	<b>14</b>	<b>11</b>	<b>2.5</b>	<b>12</b>
<b>Network Television</b>	<b>24</b>	<b>4.0</b>	<b>11</b>	<b>14</b>	<b>3.0</b>	<b>13</b>	<b>7</b>	<b>2.5</b>	<b>13</b>	<b>10</b>	<b>2.6</b>	<b>10</b>
<b>News Magazines</b>	<b>24</b>	<b>4.2</b>	<b>11</b>	<b>9</b>	<b>2.7</b>	<b>14</b>	<b>12</b>	<b>2.7</b>	<b>12</b>	<b>9</b>	<b>2.6</b>	<b>10</b>
<b>Radio</b>	<b>20</b>	<b>3.5</b>	<b>13</b>	<b>22</b>	<b>4.6</b>	<b>8</b>	<b>15</b>	<b>3.1</b>	<b>10</b>	<b>17</b>	<b>3.3</b>	<b>9</b>
<b>General Interest Consumer Magazines</b>	<b>15</b>	<b>3.1</b>	<b>14</b>	<b>15</b>	<b>3.2</b>	<b>11</b>	<b>13</b>	<b>3.1</b>	<b>10</b>	<b>10</b>	<b>2.5</b>	<b>12</b>

**OVERALL SUMMARY  
COMPUTERS & TECHNOLOGY**

**Ranking**

Information Source	Total Summary 2010			Total Summary 2004			Total Summary 2000			Total Summary 1996		
	Very Useful	Avg.	Rank	Very Useful	Avg.	Rank	Very Useful	Avg.	Rank	Very Useful	Avg.	Rank
	%			%			%			%		
<b>The Internet</b>	90	8.5	1	83	8.0	1	82	8.2	1	53	6.2	4
<b>Conventions/Seminars</b>	67	7.1	2	60	6.6	4	58	6.5	4	62	6.7	3
<b>Specialized Business Publications or Industry Newspapers</b>	66	7.0	3	72	7.1	2	80	7.9	2	71	7.5	1
<b>Trade Shows</b>	63	6.8	4	63	6.8	3	57	6.6	3	64	6.9	2
<b>Salespeople</b>	45	5.9	5	47	5.8	5	40	5.8	5	43	5.9	5
<b>General Business Publications</b>	38	5.3	6	34	5.3	6	28	4.7	7	29	4.8	7
<b>Direct Mail</b>	30	5.1	7	29	5.1	7	33	5.1	6	36	5.3	6
<b>Business Directories</b>	27	4.4	8	25	4.5	8	22	4.1	9	28	4.5	8
<b>News Magazines</b>	24	4.1	9	12	3.7	10	12	3.2	10	10	3.1	10
<b>Specialty Television</b>	24	3.9	9	9	3.0	13	13	2.9	13	8	2.6	12
<b>Daily Newspapers</b>	23	4.3	11	21	4.2	9	20	4.2	8	19	4.0	9
<b>General Interest Consumer Magazines</b>	21	3.3	12	14	3.1	12	12	3.0	10	8	2.1	14
<b>Network Television</b>	15	3.7	13	10	3.0	13	10	3.1	11	9	2.7	11
<b>Radio</b>	11	2.7	14	6	3.5	11	8	2.4	14	8	2.5	13

**OVERALL SUMMARY  
MANUFACTURING**

**Ranking**

Information Source	Total Summary 2010			Total Summary 2004			Total Summary 2000			Total Summary 1996		
	Very Useful	Avg.	Rank	Very Useful	Avg.	Rank	Very Useful	Avg.	Rank	Very Useful	Avg.	Rank
	%			%			%			%		
<b>The Internet</b>	79	7.5	1	57	6.5	3	55	6.3	4	18	3.4	8
<b>Specialized Business Publications or Industry Newspapers</b>	69	7.1	2	60	6.7	1	69	7.3	1	73	7.5	1
<b>Trade Shows</b>	63	6.9	3	61	6.5	3	65	6.9	2	59	6.7	3
<b>Salespeople</b>	50	6.4	4	57	6.6	2	59	6.7	3	64	7.0	2
<b>Conventions/Seminars</b>	46	5.9	5	41	5.2	5	38	5.2	6	39	5.3	5
<b>Direct Mail</b>	41	5.5	6	24	4.6	7	32	4.9	7	31	5.1	6
<b>Business Directories</b>	37	5.6	7	31	4.7	6	40	5.5	5	49	6.1	4
<b>General Business Publications</b>	25	4.9	8	26	4.2	8	22	4.1	8	24	4.4	7
<b>Daily Newspapers</b>	25	4.1	8	17	3.4	9	17	3.0	9	10	2.8	9
<b>Specialty Television</b>	17	3.0	10	6	1.9	14	6	1.7	13	4	1.5	14
<b>General Interest Consumer Magazines</b>	17	3.6	10	14	2.8	11	11	2.6	10	6	1.8	12
<b>News Magazines</b>	16	3.5	12	12	2.6	12	7	2.3	11	8	2.3	10
<b>Network Television</b>	13	3.4	13	4	2.0	13	6	1.8	12	4	1.8	12
<b>Radio</b>	13	3.2	13	7	3.3	10	8	1.7	13	6	1.9	11

**OVERALL SUMMARY  
RESOURCES & CONSTRUCTION**

**Ranking**

Information Source	Total Summary 2010			Total Summary 2004			Total Summary 2000			Total Summary 1996		
	Very Useful	Avg.	Rank	Very Useful	Avg.	Rank	Very Useful	Avg.	Rank	Very Useful	Avg.	Rank
	%			%			%			%		
<b>The Internet</b>	85	7.9	1	59	6.5	3	56	6.5	5	15	3.2	8
<b>Specialized Business Publications or Industry Newspapers</b>	66	6.8	2	73	7.4	1	64	7.1	1	64	7.1	1
<b>Trade Shows</b>	63	6.9	3	60	6.7	2	61	6.8	2	56	6.4	4
<b>Conventions/Seminars</b>	57	6.4	4	51	5.9	5	56	6.6	4	57	6.5	3
<b>Salespeople</b>	42	5.6	5	58	6.5	4	59	6.7	3	64	7.0	2
<b>Business Directories</b>	37	5.6	6	33	5.0	7	37	5.5	6	39	5.5	5
<b>Direct Mail</b>	33	4.9	7	38	5.3	6	35	5.4	7	33	5.2	6
<b>General Business Publications</b>	31	4.9	8	28	4.6	8	19	4.1	8	25	4.3	7
<b>Daily Newspapers</b>	18	3.5	9	20	3.8	9	10	2.7	9	16	3.0	9
<b>General Interest Consumer Magazines</b>	16	3.0	10	11	2.7	12	12	2.4	10	7	1.8	12
<b>Specialty Television</b>	15	2.9	11	10	2.3	14	4	1.8	12	5	1.6	14
<b>Network Television</b>	11	2.7	12	8	2.5	13	5	1.8	12	5	1.8	12
<b>News Magazines</b>	10	3.1	13	12	2.9	11	5	2.2	11	10	2.5	10
<b>Radio</b>	9	2.4	14	12	3.4	10	5	1.7	14	6	2.0	11

**OVERALL SUMMARY  
RETAIL**

**Ranking**

Information Source	Total Summary 2010			Total Summary 2004			Total Summary 2000			Total Summary 1996		
	Very Useful	Avg.	Rank	Very Useful	Avg.	Rank	Very Useful	Avg.	Rank	Very Useful	Avg.	Rank
	%			%			%			%		
Trade Shows	65	6.9	1	68	7.0	2	65	7.1	2	66	7.1	1
The Internet	63	6.9	2	46	5.5	4	32	4.7	6	13	2.8	12
Specialized Business Publications or Industry Newspapers	63	6.8	2	66	6.9	3	54	6.3	3	62	6.8	3
Salespeople	60	6.7	4	69	7.2	1	68	7.2	1	65	7.0	2
Conventions/Seminars	49	5.8	5	44	5.3	5	56	6.3	3	47	5.9	4
Direct Mail	37	5.7	6	37	5.0	6	35	5.3	5	33	5.1	5
Daily Newspapers	33	4.2	7	21	4.2	9	20	3.9	9	25	4.2	7
Business Directories	24	4.4	8	32	4.5	8	28	4.6	7	30	4.8	6
Specialty Television	23	3.4	9	19	3.4	12	12	2.7	13	13	2.6	14
Network Television	20	3.7	10	22	3.4	12	14	2.9	12	16	3.0	10
General Business Publications	18	4.0	11	29	4.6	7	25	4.4	8	26	4.2	7
General Interest Consumer Magazines	18	3.5	11	16	3.5	11	12	3.2	10	11	2.8	12
Radio	17	3.8	13	19	4.2	9	10	2.7	13	13	3.1	9
News Magazines	15	3.4	14	17	3.2	14	10	3.0	11	14	2.9	11

**OVERALL SUMMARY  
TRAVEL & TOURISM**

**Ranking**

Information Source	Total Summary 2010		
	Very Useful %	Avg.	Rank
<b>The Internet</b>	78	7.8	1
<b>Trade Shows</b>	75	7.6	2
<b>Specialized Business Publications or Industry Newspapers</b>	69	7.3	3
<b>Conventions/Seminars</b>	57	6.6	4
<b>Salespeople</b>	57	6.5	4
<b>Daily Newspapers</b>	47	5.8	6
<b>Direct Mail</b>	46	5.8	7
<b>General Business Publications</b>	39	5.2	8
<b>Specialty Television</b>	31	4.2	9
<b>Network Television</b>	30	4.5	10
<b>News Magazines</b>	29	4.3	11
<b>Business Directories</b>	28	4.7	12
<b>Radio</b>	28	4.1	12
<b>General Interest Consumer Magazines</b>	20	3.6	14

## INFORMATION NEEDS UNIQUE TO THE CANADIAN MARKET

*Q. Do you have information needs that you would consider unique to the Canadian market?*

	<b>% Having Unique to Canada Information Needs</b>		
	<b>2010</b>	<b>2004</b>	<b>2000</b>
	%	%	%
<b>Total All Markets</b>	<b>52</b>	<b>43</b>	<b>40</b>
Agriculture	56	54	44
Automotive & Trucking	52	40	50
Computers & Technology	47	52	32
Manufacturing	53	30	33
Resources & Construction	53	43	37
Retail	47	33	40
Travel & Tourism	56	-	-

## IMPORTANCE OF CANADIAN BUSINESS PUBLICATIONS REPORTING ON EACH MARKET SECTOR

*Q. How important is it for you to have Canadian business publications reporting on your business/industry?*

	% Very/Somewhat Important		
	2010	2004	2000
	%	%	%
<b>Total All Markets</b>	<b>87</b>	<b>86</b>	<b>87</b>
Agriculture	88	88	90
Automotive & Trucking	81	82	81
Computers & Technology	87	87	91
Manufacturing	83	79	85
Resources & Construction	90	88	86
Retail	88	85	85
Travel & Tourism	89	-	-

## WEBSITE USAGE IN PAST 12 MONTHS

Q. Which of the following have you done in the past 12 months? (Circle all that apply)

	Total	Agriculture	Automotive & Trucking	Computers & Technology	Manufacturing	Resources & Construction	Retail	Travel
	%	%	%	%	%	%	%	%
Visited a website belonging to a specialized business publication or business newspaper	70	68	71	80	60	66	73	76
Visited a website belonging to a supplier or manufacturer through a link on a publication's website	68	63	66	80	60	66	69	70
Directly searched for and visited a website belonging to a specific supplier or manufacturer	80	85	74	91	73	79	79	81
Visited a supplier or manufacturer website based on an article or new product announcement in a specialized business publication	61	64	56	71	52	64	58	62
Visited a supplier or manufacturer website based on an ad in a specialized business publication	58	60	57	64	52	59	55	59

## ACTIONS TAKEN AFTER VISITING BUSINESS RELATED WEBSITES IN PAST 12 MONTHS

*Q. From any business related website you have visited in the past 12 months, which of the following have you done?  
(Circle all that apply)*

	<b>Total</b>	<b>Agriculture</b>	<b>Automotive &amp; Trucking</b>	<b>Computers &amp; Technology</b>	<b>Manufacturing</b>	<b>Resources &amp; Construction</b>	<b>Retail</b>	<b>Travel</b>
	%	%	%	%	%	%	%	%
<b>Took 1 or more actions</b>	<b>90</b>	<b>87</b>	<b>92</b>	<b>91</b>	<b>86</b>	<b>95</b>	<b>88</b>	<b>88</b>
Sourced a supplier or product	71	62	75	69	67	84	75	68
Made an inquiry	72	75	73	78	64	76	68	69
Made a purchase	50	38	50	62	41	46	50	65

## WEBSITE PREFERENCES

*Q. Which of the following types of websites do you prefer for each of the following?*

<b>TRUSTED SOURCE OF INFORMATION</b>	<b>Total</b>	<b>Agriculture</b>	<b>Automotive &amp; Trucking</b>	<b>Computers &amp; Technology</b>	<b>Manufacturing</b>	<b>Resources &amp; Construction</b>	<b>Retail</b>	<b>Travel</b>
	%	%	%	%	%	%	%	%
Vendor/Supplier Website	46	42	42	45	49	50	47	45
Business Publication Website	18	14	16	26	18	14	12	29
No Preference	33	34	39	29	30	36	40	24
Not stated	3	10	3	-	3	-	1	2

<b>EASE OF NAVIGATION</b>	<b>Total</b>	<b>Agriculture</b>	<b>Automotive &amp; Trucking</b>	<b>Computers &amp; Technology</b>	<b>Manufacturing</b>	<b>Resources &amp; Construction</b>	<b>Retail</b>	<b>Travel</b>
	%	%	%	%	%	%	%	%
Vendor/Supplier Website	40	31	47	40	35	44	39	40
Business Publication Website	14	7	16	21	16	11	10	15
No Preference	42	49	35	39	46	43	47	38
Not stated	4	13	2	-	3	2	4	7

<b>EASE OF LOCATING A SPECIFIC PRODUCT TYPE</b>	<b>Total</b>	<b>Agriculture</b>	<b>Automotive &amp; Trucking</b>	<b>Computers &amp; Technology</b>	<b>Manufacturing</b>	<b>Resources &amp; Construction</b>	<b>Retail</b>	<b>Travel</b>
	%	%	%	%	%	%	%	%
Vendor/Supplier Website	49	39	51	53	44	54	49	55
Business Publication Website	13	14	16	17	13	10	11	9
No Preference	34	36	32	30	39	35	37	31
Not stated	4	11	1	-	4	1	3	6

## JOB TITLE

	<b>Total</b>	<b>Agriculture</b>	<b>Automotive &amp; Trucking</b>	<b>Computers &amp; Technology</b>	<b>Manufacturing</b>	<b>Resources &amp; Construction</b>	<b>Retail</b>	<b>Travel</b>
	%	%	%	%	%	%	%	%
Chairman, CEO, Owner, Partner, Executive VP, etc.	49	75	49	30	37	44	64	42
Vice President or General Manager of Department, Division, Operations, Production, Maintenance	24	15	27	22	29	19	23	31
Supervisor of Department/ Division/Operations/Production/ Maintenance	18	7	18	30	27	20	6	17
Other	9	3	6	18	7	17	7	10

## DEGREE OF BUSINESS PURCHASE INFLUENCE

*Q. Do you get involved at all in developing specifications, selecting suppliers or approving expenditures in the purchase of products or services for your company?*

	% with Purchase Influence		
	2010	2004	2000
	%	%	%
<b>Total All Markets</b>	<b>89</b>	<b>83</b>	<b>85</b>
Agriculture	94	84	76
Automotive & Trucking	94	86	82
Computers & Technology	89	89	84
Manufacturing	91	93	92
Resources & Construction	87	86	86
Retail	92	83	85
Travel & Tourism	78	-	-

## **APPENDIX**

**Mailing Results  
Letter to Respondent  
Questionnaire**

## Mailing Results

	<b>Agriculture</b>	<b>Automotive &amp; Trucking</b>	<b>Computers &amp; Technology</b>	<b>Manufacturing</b>	<b>Resources &amp; Construction</b>	<b>Retail</b>	<b>Travel</b>	<b>TOTAL</b>
First Mailing	800	800	800	800	800	800	800	5,600
Total Mailed	800	1,422	1,131	800	1,403	1,415	1,443	8,414
Total Returns	105	113	115	113	108	108	115	777
*Survey Base: Respondents with Business Purchase Involvement	99	106	102	102	94	99	91	693

\* The survey is based on respondents who are involved in developing specifications, selecting suppliers or approving expenditures for their company or business.

February 2010

Dear Colleague,

Could you please help us?

We are conducting a brief survey on the usage of various information sources in your industry.

Your answers are critical to the accuracy of this study as we are sending it to only a small randomly selected sample. We would greatly appreciate your cooperation.

The enclosed questionnaire will take only a minute or two to complete. A prepaid business reply envelope is enclosed for your convenience. If you prefer to answer online, please type **takeq.com/go88** in your internet browser to connect to the survey.

Please be sure to complete the enclosed DRAW CARD and return it in the postage paid envelope with your completed questionnaire. If you choose to answer online, use the envelope to return your Draw Card.

Starch Research is an independent marketing research organization. We are members of MRIA-ARIM (Marketing Research and Intelligence Association) and an Associate Member of Canadian Business Press.

Our role is to combine the answers you provide with those of other respondents. Your responses to these questions will remain strictly confidential.

Many thanks for your kind cooperation.

Sincerely,

A handwritten signature in black ink, appearing to read 'Brian C. Hickey', written in a cursive style.

Brian C. Hickey  
President

## INFORMATION SOURCES QUESTIONNAIRE

Q1. Do you get involved at all in developing specifications, selecting suppliers or approving expenditures in the purchase of products or services for your company or business?

1 YES

2 NO

Q2. On the following scale of “0” to “10”, where “0” is *NOT AT ALL USEFUL* and “10” is *VERY USEFUL*, please circle the number that best describes *how useful* each of the following sources is in *providing information regarding the products and services you specify, the suppliers that you select, or the expenditures that you approve.*

INFORMATION SOURCES	NOT AT ALL USEFUL										VERY USEFUL
General Interest Consumer Magazines (Reader’s Digest, etc...)	0	1	2	3	4	5	6	7	8	9	10
Trade Shows	0	1	2	3	4	5	6	7	8	9	10
The Internet	0	1	2	3	4	5	6	7	8	9	10
Direct Mail	0	1	2	3	4	5	6	7	8	9	10
Network Television	0	1	2	3	4	5	6	7	8	9	10
Conventions/Seminars	0	1	2	3	4	5	6	7	8	9	10
Specialty Television	0	1	2	3	4	5	6	7	8	9	10
Business Directories	0	1	2	3	4	5	6	7	8	9	10
General Business Publications (Canadian Business etc...)	0	1	2	3	4	5	6	7	8	9	10
Salespeople	0	1	2	3	4	5	6	7	8	9	10
Newsmagazines (Maclean’s, etc...)	0	1	2	3	4	5	6	7	8	9	10
Daily Newspapers	0	1	2	3	4	5	6	7	8	9	10
Specialized Business Publications or Newspapers Dealing With Your Industry	0	1	2	3	4	5	6	7	8	9	10
Radio	0	1	2	3	4	5	6	7	8	9	10

Q3a. Which of the following have you done in the past 12 months? **CIRCLE ALL THAT APPLY.**

- 1 Visited a website belonging to a specialized business publication or business newspaper
- 2 Visited a website belonging to a supplier or manufacturer through a link on a publication’s website
- 3 Directly searched for and visited a website belonging to a specific supplier or manufacturer
- 4 Visited a supplier or manufacturer website based on an article or new product announcement in a specialized business publication
- 5 Visited a supplier or manufacturer website based on an ad in a specialized business publication

Q3b. From any business related website you have visited in the past 12 months, which of the following have you done? **CIRCLE ALL THAT APPLY.**

1 Sourced a supplier or product

2 Made an inquiry

3 Made a purchase

4 None of these

Q3c. Which of the following types of websites do you prefer for each of the following?

	Vendor/Supplier Website	Business Publication Website	No Preference
Trusted source of information	1	2	3
Ease of navigation	1	2	3
Ease of locating a specific product type	1	2	3

Q4. Do you have information needs that you would consider unique to the **Canadian market**?

1 YES

2 NO

Q5. How important is it for you to have **Canadian** business publications reporting on your business/industry?

1 Very important

2 Somewhat important

3 Not very important

4 Not at all important

Q6. Which of the following best represents your title or position? **CIRCLE THE APPROPRIATE NUMBER.**

1 Chairman, CEO, Owner, Partner, Executive Vice President, etc.

2 Vice President or General Manager of Department, Division, Operations, Production, Maintenance

3 Supervisor of Department/Division/Operations/Production/Maintenance

4 Other (PLEASE SPECIFY) \_\_\_\_\_

Q7. In what province do you reside?

1 Newfoundland or Labrador

2 Prince Edward Island

3 New Brunswick

4 Nova Scotia

5 Quebec

6 Ontario

7 Manitoba

8 Saskatchewan

9 Alberta

10 British Columbia

11 Yukon, Northwest Territories or Nunavut

## INFORMATION SOURCES QUESTIONNAIRE

Q1. Do you get involved at all in developing specifications, selecting suppliers or approving expenditures in the purchase of products or services for your company or business?

1 YES

2 NO

Q2. On the following scale of “0” to “10”, where “0” is *NOT AT ALL USEFUL* and “10” is *VERY USEFUL*, please circle the number that best describes *how useful* each of the following sources is in *providing information regarding the products and services you specify, the suppliers that you select, or the expenditures that you approve.*

INFORMATION SOURCES	NOT AT ALL USEFUL										VERY USEFUL
	0	1	2	3	4	5	6	7	8	9	
Radio	0	1	2	3	4	5	6	7	8	9	10
Specialized Business Publications or Newspapers Dealing With Your Industry	0	1	2	3	4	5	6	7	8	9	10
Daily Newspapers	0	1	2	3	4	5	6	7	8	9	10
Newsmagazines (Maclean’s, etc...)	0	1	2	3	4	5	6	7	8	9	10
Salespeople	0	1	2	3	4	5	6	7	8	9	10
General Business Publications (Canadian Business etc...)	0	1	2	3	4	5	6	7	8	9	10
Business Directories	0	1	2	3	4	5	6	7	8	9	10
Specialty Television	0	1	2	3	4	5	6	7	8	9	10
Conventions/Seminars	0	1	2	3	4	5	6	7	8	9	10
Network Television	0	1	2	3	4	5	6	7	8	9	10
Direct Mail	0	1	2	3	4	5	6	7	8	9	10
The Internet	0	1	2	3	4	5	6	7	8	9	10
Trade Shows	0	1	2	3	4	5	6	7	8	9	10
General Interest Consumer Magazines (Reader’s Digest, etc...)	0	1	2	3	4	5	6	7	8	9	10

Q3a. Which of the following have you done in the past 12 months? **CIRCLE ALL THAT APPLY.**

- 1 Visited a website belonging to a specialized business publication or business newspaper
- 2 Visited a website belonging to a supplier or manufacturer through a link on a publication’s website
- 3 Directly searched for and visited a website belonging to a specific supplier or manufacturer
- 4 Visited a supplier or manufacturer website based on an article or new product announcement in a specialized business publication
- 5 Visited a supplier or manufacturer website based on an ad in a specialized business publication

Q3b. From any business related website you have visited in the past 12 months, which of the following have you done? **CIRCLE ALL THAT APPLY.**

1 Sourced a supplier or product

2 Made an inquiry

3 Made a purchase

4 None of these

Q3c. Which of the following types of websites do you prefer for each of the following?

	Vendor/Supplier Website	Business Publication Website	No Preference
Trusted source of information	1	2	3
Ease of navigation	1	2	3
Ease of locating a specific product type	1	2	3

Q4. Do you have information needs that you would consider unique to the **Canadian market**?

1 YES

2 NO

Q5. How important is it for you to have **Canadian** business publications reporting on your business/industry?

1 Very important

2 Somewhat important

3 Not very important

4 Not at all important

Q6. Which of the following best represents your title or position? **CIRCLE THE APPROPRIATE NUMBER.**

1 Chairman, CEO, Owner, Partner, Executive Vice President, etc.

2 Vice President or General Manager of Department, Division, Operations, Production, Maintenance

3 Supervisor of Department/Division/Operations/Production/Maintenance

4 Other (**PLEASE SPECIFY**) \_\_\_\_\_

Q7. In what province do you reside?

1 Newfoundland or Labrador

2 Prince Edward Island

3 New Brunswick

4 Nova Scotia

5 Quebec

6 Ontario

7 Manitoba

8 Saskatchewan

9 Alberta

10 British Columbia

11 Yukon, Northwest Territories or Nunavut

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